

USDA Foreign Agricultural Service

# GAIN Report

Global Agricultural Information Network

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## Netherlands

**Post:** The Hague

### **Double-digit growth rates for Dutch organic market**

**Report Categories:**

Special Certification - Organic/Kosher/Halal

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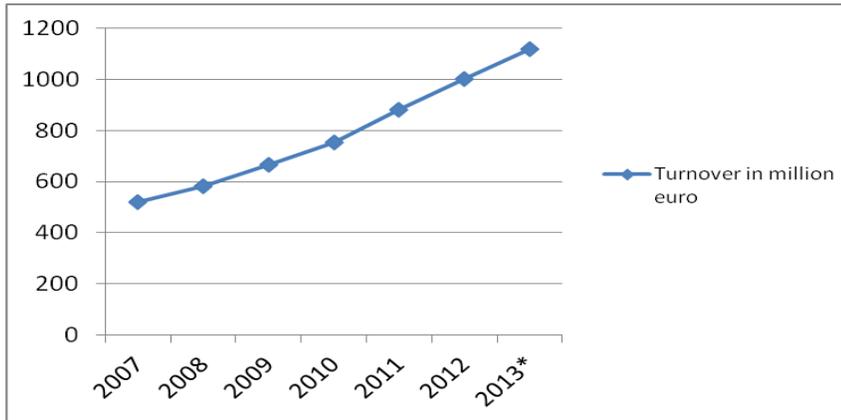
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**Report Highlights:**

This year sales of organic food products increased by 12 percent compared to the first 6 months of 2012. Sales grew especially in the segments eggs, bread and fresh produce and were the result of large supermarkets expanding their product range of organic products.

The Dutch organic industry has an annual turnover of €2 billion (or \$2.75 billion)<sup>1</sup>, including exports. More than 1,500 certified organic farmers and 1,700 manufacturing companies are currently active in the sector, which employs around 100,000 people. Total spending on organic food products doubled in past 5 years and reached in 2012 more than €1 billion (or \$1.38 billion). It includes sales at food retailers, HRI outlets and organic specialty stores but also at farmers markets and on-farm.



Source: Bionext, \*FAS/The Hague estimate

In the first half year of 2013, the sales of organic food products increased by 12 percent compared to the first 6 months of last year. According to LEI Wageningen UR, Dutch leading social-economic research institute, the double digit growth figures are impressive especially given the current recession in the Netherlands and since total food market in the Netherlands is hardly growing. LEI researcher Johan Bakker expects the growth to continue. With a market share of 2 to 2.5 percent, the organic sector remains a niche market, focusing on the most prosperous and progressive 15 percent of Dutch population.

The leading sales channels food retailers, HRI outlets and organic specialty stores account together for 85 to 90 per cent of total sales of organic food products. Growth figures generated in supermarkets are most impressive (15 percent), while the lowest growth (still 8 percent) was achieved at specialized organic stores.

The product categories eggs (30 percent), bread (19 percent) and fresh produce (17 percent) grew most. According to the Dutch umbrella organization for organics Bionext these impressive figures were mainly the result of large supermarkets (like Plus and Dirk van den Broek) expanding their product range of organic products. Growth of organic sales in the product categories dairy and meat & meat products was only 7 and 3 percent respectively.

Growing spending on organic products in combination with the organic arrangement between the U.S. and the EU creates opportunities for U.S. exporters. The potential market for U.S. organics on the EU

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<sup>1</sup> \$1=€0.727

market is estimated at almost \$50 million and opportunities are to be found in vegetables, fresh fruit, dried fruit and nuts, specialty grains and processed products. More information on opportunities for U.S. exporters can be found at GAIN NL3003 or

<http://fasintranetapps-gain.fas.usda.gov/Applications/FileDownload.aspx?FileID=11844>.